eWiSACWIS Basics
How Do I Guide

WiSACWIS Basics

Save / Close / Continue Buttons

How Do I…?	Selections	Tips & Guidelines
Save entered information and exit a page	▪ Click the Save button. ▪ Click the Close button.	*You must click the Save button to save data. Your save has been successful when you are returned to the page with no validation messages. The Save button will also be disabled at this time. To close the page, click the Close button.*
Exit a page without saving information	▪ Click the Close button.	*Answer "No" to the 'Do you wish to save your changes?'message to not save information you entered on a page.*
Make selection and continue to next page	▪ Click the Continue button.	

WiSACWIS Menu Bar Highlights

How Do I…?	Selections	Tips & Guidelines
Change outliner to participant view	▪ Check the Participant View checkbox.	*This will allow you to view <u>all</u> the information in the participant's file.*
Change outliner to unrestricted view	▪ Uncheck the Date Restricted checkbox.	*By deselecting the Date Restricted View, you see the complete history.*
Expand desktop view	▪ Click the blue expand arrow.	*This will hide the Messages and Links portion of the desktop. If you want to restore the Messages and Links view, click the left pointing blue expand arrow in the top right corner of the screen.*
Create new work	▪ Click Create ▪ On the Create menu, select the appropriate type of work that needs to be created.	*This will allow you to create new pieces of work including intakes, case work, and provider work.*
Search for case/ person/provider/ worker not assigned to you	▪ Click Utilities > Search. ▪ On the appropriate tab of the Search page, enter the applicable data/values. ▪ Click the Search button.	*Expand the Search page outliner to find/view specific information about a case/person/provider/ worker.*
View message log	▪ Click Utilities > View Message Log.	

WiSACWIS Banner Highlights

How Do I…?	Selections	Tips & Guidelines
Print a screen (page)	▪ Click the Print Screen icon.	
Refresh the desktop	▪ Click the Refresh icon.	*Newly created/assigned work will be displayed on the desktop.*
Create new work on a case/provider	▪ Click the Case Work or Provider Work icon.	*This is a short cut that you can use instead of Create > Case Work or Create > Provider Work on the menu bar.*
Search for case/ person/provider/ worker not assigned to you	▪ Click the Search icon.	*This is a short cut that you can use instead of Utilities > Search on the menu bar.*
View on-line help	▪ Click the Help icon.	*When you have questions on how to use the eWiSACWIS system, you can access eWiSACWIS Help by selecting this button.*
Exit eWiSACWIS	▪ Click the Logout icon.	

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Keyboard Shortcuts

How Do I…?	Selections
Copy Text	In the appropriate text box, highlight the text using your mouse and hold down the Ctrl and C keys on the keyboard to copy. You may also copy text from word processing documents to WiSACWIS using these steps.
Paste Text	In the destination text box, place your cursor in the box by single clicking. Then, hold down the Ctrl and V keys to paste. You may also paste text from eWiSACWIS into word processing documents using these steps.
Print Screen	Instead of selecting Print on the banner, hold down the Ctrl and P keys on the keyboard
Exit eWiSACWIS	Instead of selecting Logout on the banner, hold down the Alt and F4 keys on the keyboard.
Move to next field	Place your cursor in a field on the page. Select the Tab key. This will place your cursor in the next user-entered field.
Move to previous field	Hold down the Shift key and select the Tab key. This will place your cursor in the previous field.
Select a check box	Select the Tab key to navigate to the correct check box, then select the space bar to check the desired value. Select the Tab key to move to the next field.
Select values from dropdowns	To highlight a value from a long drop down list, select the first letter of your desired value. You will move to the first value beginning that letter. If the desired value is further down in the list, select the letter on the keyboard again or use the Down arrow key. Repeat until you have highlighted your desired value.
Select buttons or tabs	Select buttons or tabs by holding down the Alt key and the key for the underlined letter of the button or tab you want to select. For example, the Search button displays with the 'S' underlined. Hold down the Alt and S keys on the keyboard.
Switch from eWiSACWIS to other application	Hold down the Alt and Tab keys. You will have a menu of open applications from which to choose. Holding the Alt key, keep selecting the Tab key until you have selected the page you wish to display.

WiSACWIS Help Desk (866) 335-2180

helpdesk@wi.gov

WiSACWIS Knowledge Web

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/index.htm

WiSACWIS Quick Reference Guides

http://dhfs.wisconsin.gov/wisacwis/knowledge_web/Helpdesk/quick_reference_guides.htm

Approvals

How Do I…?	Selections	Tips & Guidelines
Submit work for supervisory approval	▪ On the applicable page, select Approval from the Options list and click the Go button. ▪ Select the applicable approval radio button and click the Continue button.	*Click the Other link in the Supervisor Approval box to select a different supervisor.*
Approve case/provider work	▪ On the Approvals expando, expand the Pending Approvals for 'Your Worker' name icon and click the applicable pending approval item. ▪ On the applicable case/provider work page, select Approval from the Options list and click the Go button. *Note: The Pending Approvals displays with the desk icon and your name.*	*Approval Decision selections:* ***Approve**-to approve the work and forward for Supervisory Approval, if needed;* ***Not Approve**-to finalize work that is not receiving approval. The work is "frozen" with a status of Not Approved.* ***Reroute**-to forward work for approval to another worker using the Create Worker Assignment page.* ***Recall/Return**-to recall or return work that has been submitted for approval. Work can be manually recalled by the worker or supervisor. Work is automatically recalled when any item on the page is changed by the worker who initiated the approval. The approval process must be re-initiated.*
View approval information	▪ On the Approvals expando, expand the My Approvals expando to view the applicable approval item, ***or*** ▪ On the Approvals expando, expand the Approvals In Progress expando to view the applicable approval item, ***or*** ▪ On the Approvals expando, expand the Approvals History expando to view the applicable approval item, ***or*** ▪ On the applicable page, select Approval from the Options drop-down and click the Go button.	*This will allow you to view the complete approval history chain once a piece of work has received final approval.* ***Initial Status/Initial Action**: Item has been created by original worker but not approved.* ***Pending Status/Approved Action**: Item is in Pending status in the approval process but has been approved by original worker.* ***Pending Status/Received Action**: Item is in Pending status in the approval process but has been received by next approver or supervisor.* ***Approved Status/Approved Action**: Item has completed the approval process.* *Note: After 4 days the approved work will be removed from the Approvals in Progress outliner.*
Add/view approval comments	▪ On the Approvals expando, expand the Pending Approvals for 'Your Worker' name icon and click the Actions link on the applicable approval. ▪ On the Actions pop-up page, select Comments. ▪ Click the Continue button. ▪ Add/view comments in the free form text box and click the Save button. Click Close.	*Approval rows with comments will be displayed with a pencil icon.*

View Ticklers

How Do I...?	Selections	Tips & Guidelines
View Case/Provider Ticklers from Case/Provider outliner	▪ On the Case or Provider outliner, click the Actions link for the appropriate case or provider. ▪ Select the View Ticklers radio button and click Continue.	*View Ticklers allows you to view all ticklers and who is assigned the tickler for a case or provider.*

Notes

How Do I...?	Selections	Tips & Guidelines
Enter note on case/ provider assigned to you	▪ Click Create > Case Work or Provider Work. ▪ Select the appropriate Narrative list item, case/participant or provider. ▪ Click the Create button. *Note: Once the Note Finalized checkbox is selected, the note is no longer editable.*	*Workers entering notes can identify the worker who actually made the contact with the case participants or provider by searching out a different worker for the Worker Making Contact field.* *Only the worker identified as the Worker Creating Note or the Worker Making Contact with an assignment to the case or provider can edit the note.* *Use the spell check feature on the banner to spell check the note before the note is finalized.* *You can edit a note up to 30 days from the date it is created. By selecting the Note Finalized check box and the Save button, the case note is finalized. After 30 days, if the Note Finalized checkbox has not been selected, a batch process will automatically finalize the note for you. Once finalized, you cannot edit the case note. The note will also be finalized if case closure is completed and approved before the 30 day period has passed.*
Enter note on case/ provider not assigned to you	▪ Click Utilities > Search. ▪ On the Case or Provider Organization tab of the Search page, enter the applicable data/values. ▪ Click the Search button. ▪ Click the Actions link for the appropriate case/provider. ▪ Select the Create Case Note radio button and click Continue.	*Notes are one exception in eWiSACWIS where you can enter information on a case/provider that is not assigned to you.* *Only the worker identified as the Worker Creating Note or the Worker Making Contact with an assignment to the case or provider can edit the note. Notes cannot be edited from search mode.*
Enter correction note	▪ On the Case Note or Provider Note page, click the Insert Correction Note button.	*The Insert Correction Note button is enabled only when the note is finalized. This allows you to append a correction to an existing note.*
Print a specific note	▪ On the Cases or Providers outliner, click the applicable case or provider icon to select the appropriate Narrative item. ▪ Select Print Note from the Options list on the Case Notes or Provider Notes page.	

How Do I…?	Selections	Tips & Guidelines
Filter case/provider notes to view or print multiple notes	▪ On the Cases or Providers outliner, click the Actions link for the applicable case or provider. ▪ Select the Case Note Criteria Search radio button and click Continue. ▪ Enter the date range and click category, type, and/or case participant selections, as applicable on the Case note Search Criteria page. ▪ Click the Search button.	*This allows you to access specific notes quickly without scrolling through a long list of notes under the Narrative subject on the outliner.* *The notes retrieved can be filtered by individual worker by selecting a worker in the Worker Name field.* *Use the Print or View links to print or view specific notes.* *Select Print All Notes from the Options list to print all notes displayed in the Case Note Criteria Search.*

Meetings

How Do I…?	Selections	Tips & Guidelines
Set up meeting on a case/provider assigned to you	▪ Click Create > Case Work, or Provider Work. ▪ Click the applicable item, case or provider, case or provider participant. ▪ Click the Create button. ▪ Enter the applicable data/values. ▪ Click the Save button.	*Meeting participants with eWiSACWIS access will be notified via automated messaging.*
Set up meeting on case/provider not assigned to you	▪ Click Utilities > Search. ▪ On the Case or Provider Organization tab of the Search page, enter the applicable data/values. ▪ Click the Search button. ▪ Click the Actions link for the appropriate case/provider. ▪ Select the Create Meeting radio button and click Continue. ▪ Enter the appropriate data/values. ▪ Click the Save button.	*Use Participant View to include a case participant.*

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Search

How Do I…?	Selections	
Search for a Case	▪ Select Utilities > Search. ▪ Enter at a minimum a Last Name or Case ID. ▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High). ▪ Click the Search button. ▪ Sort the search results by Case number or Status by selecting Case # or Status from the Sort By field (if needed).	*You can also click the Search icon at the top of the Desktop to open the Search window.* *If needed, narrow the search further by entering information in the Site and Zip Code fields. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last and First Name fields.*
Search for a Person	▪ Select Utilities > Search. ▪ Click the Person tab. ▪ Enter at a minimum a Last Name, Person ID, or SSN. ▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High). ▪ Click the Search button. ▪ Sort the search results by DOB by selecting DOB from the Sort By field (if needed).	*You can also click the Search icon at the top of the Desktop to open the Search window.* *If needed, narrow the search further by entering information in the DOB, Gender, Street, City, and Zip Code fields. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last, First, and Street Name fields.*
Search for a Provider	▪ Select Utilities > Search. ▪ Click the Provider Organization tab. ▪ Enter at a minimum a Provider Name, Provider ID, or Parent Agency ID. ▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High). ▪ Click the Search button.	*You can also click the Search icon at the top of the Desktop to open the Search window.* *If needed, narrow the search further by entering information in the Provider Type, Site, County, and Zip Code fields. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last and First Name fields.* *The "Search Providers of Parent Agency" checkbox will return the parent agency and all providers under that parent agency.*
Search for a Worker	▪ Select Utilities > Search. ▪ Click the Worker tab. ▪ Enter at a minimum a Last Name, Worker ID, or Employee ID. ▪ If entering a search with data in the name fields, set the Search Precision to the setting needed (Low to High). ▪ Click the Search button. ▪ Sort the search results by Site # by selecting Site # from the Sort By field (if needed).	*You can also click the Search icon at the top of the Desktop to open the Search window.* *If needed, narrow the search further by entering information in Site and County, fields. Setting the Search Precision to a lower setting will expand the search results. Placing the setting at High will return results that are an exact match based on the information entered in the Last and First Name fields.*